



Miami-Dade County

In-Progress Evaluations Conversion - Job Aid

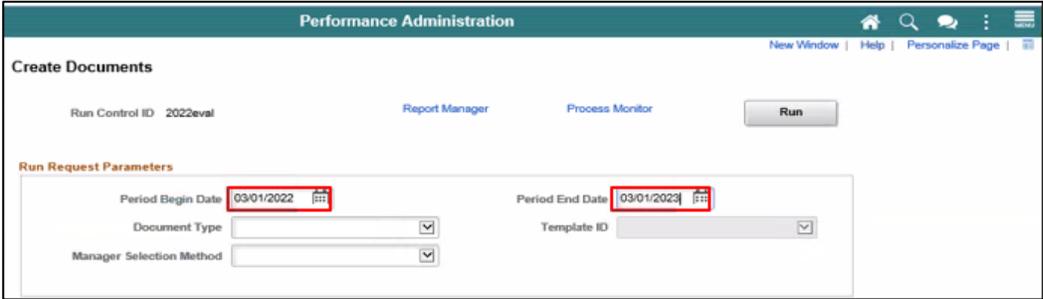
DESCRIPTION

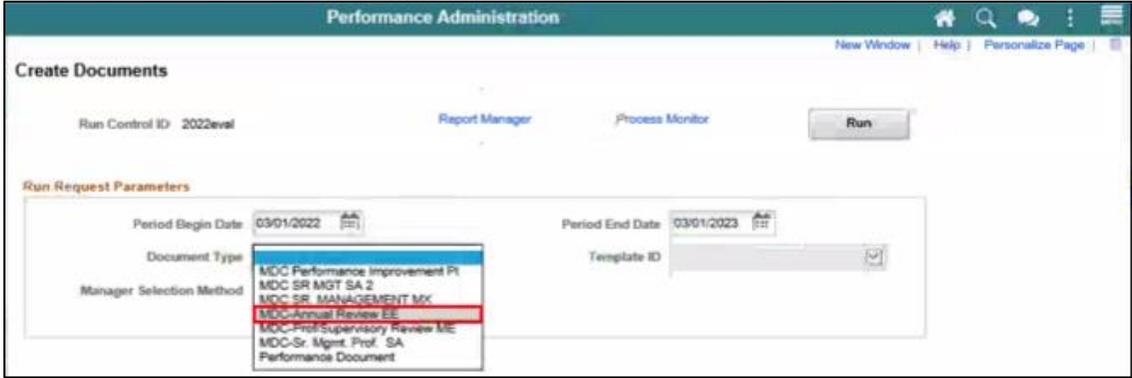
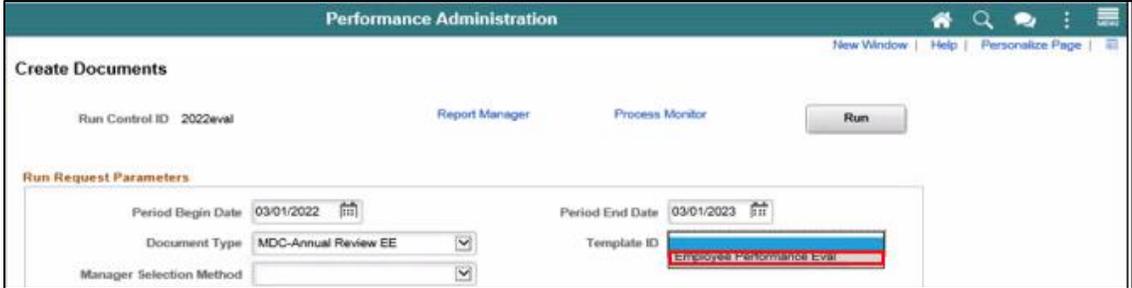
This job aid is for DPRs.

The purpose of this job aid is to help end users recreate performance evaluations in INFORMS that were not completed in legacy.



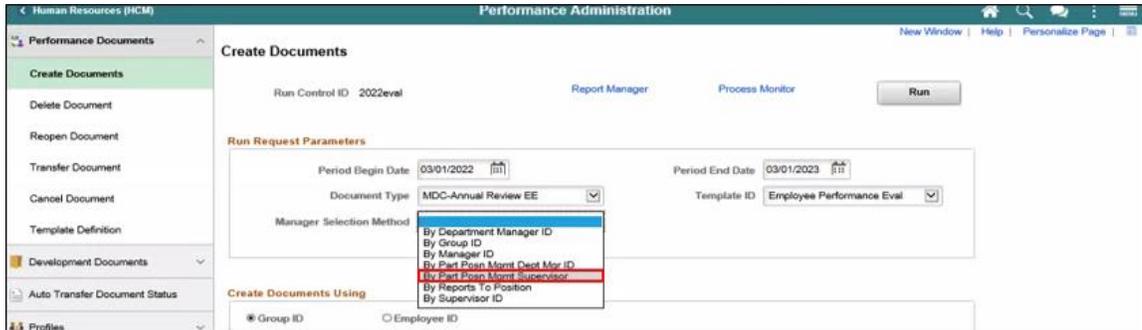
MANUALLY GENERATE PERFORMANCE EVALUATION DOCUMENT

Step	Action
1.	<ul style="list-style-type: none"> Log into INFORMS. Navigate to Human Resources (HCM) > Performance Administration > Performance Documents > Create Documents
2.	<ul style="list-style-type: none"> Select the Add a New Value tab. Enter a name in the Run Control ID field. Select the Add button. 
3.	<ul style="list-style-type: none"> Enter the date that Employee’s evaluation period began in the Period Begin Date field. Enter the date that Employee’s evaluation period began in the Period End Date field. 

<p>4.</p>	<p>Depending on the Employee, the DPR should select one of the following types of evaluation documents:</p> <table border="1" data-bbox="321 331 1469 499"> <thead> <tr> <th>Document Type</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>MDC SR. MANAGEMENT MX</td> <td>Senior Management/Executive Evaluation</td> </tr> <tr> <td>MDC-Annual Review EE</td> <td>Employee Evaluation</td> </tr> <tr> <td>MDC-Prof/Supervisory Review ME</td> <td>Professional/Management Evaluation</td> </tr> </tbody> </table>	Document Type	Description	MDC SR. MANAGEMENT MX	Senior Management/Executive Evaluation	MDC-Annual Review EE	Employee Evaluation	MDC-Prof/Supervisory Review ME	Professional/Management Evaluation
Document Type	Description								
MDC SR. MANAGEMENT MX	Senior Management/Executive Evaluation								
MDC-Annual Review EE	Employee Evaluation								
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<p>5.</p>	<p>Select the Document Type list and select the desired Performance Document.</p> 								
<p>6.</p>	<p>Select the Template ID list and select the available option.</p> 								

7.

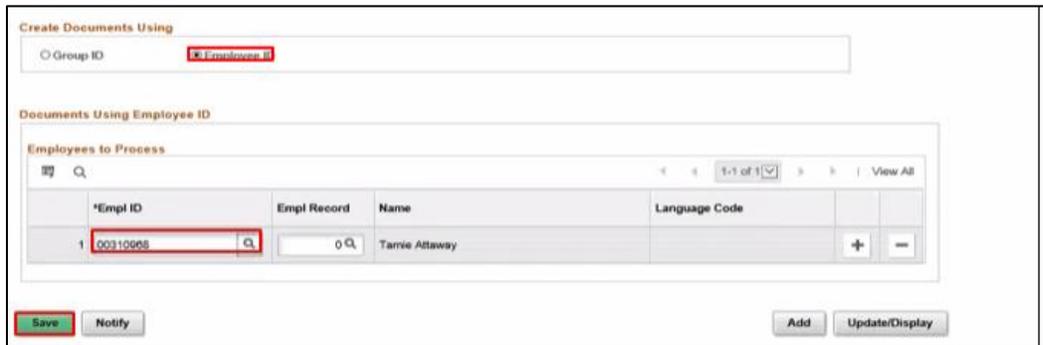
Select the **Manager Selection Method** list and select the **By Part Posn Mgmt Supervisor** option.



Note: If Position Management is missing a Supervisor and/or the Employee is no longer reporting to the Supervisor they reported to during the evaluation year, go to **Step 15**.

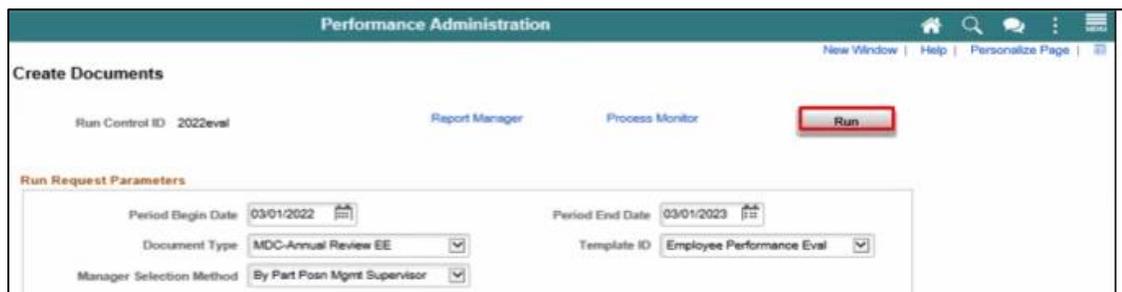
8.

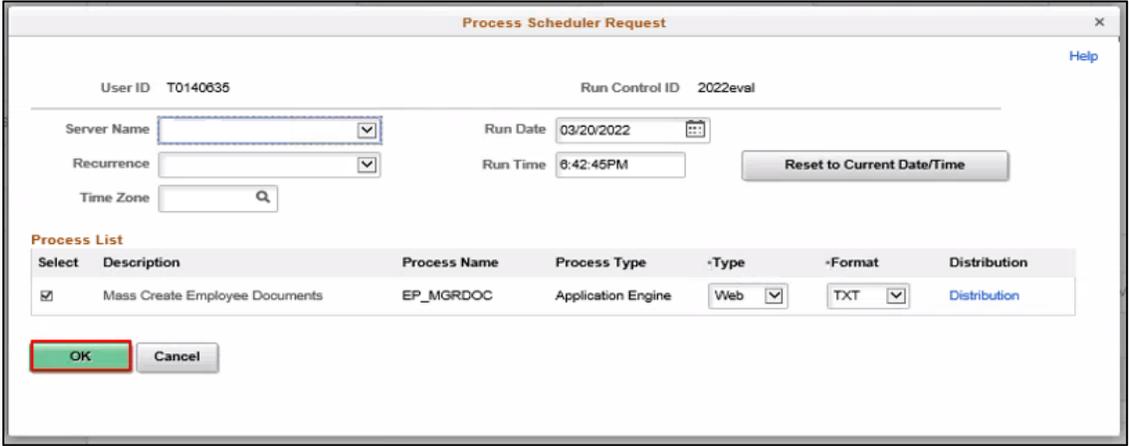
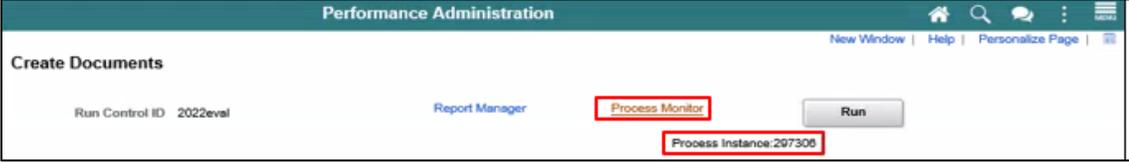
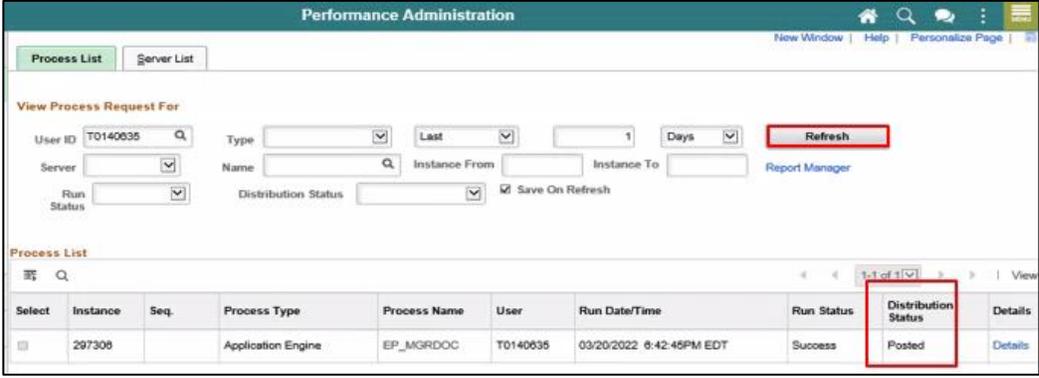
- Select the **Employee ID** option.
- Select the **Empl ID** field, then enter the Employee’s ID.
- Select the **Save** button.



9.

Select the **Run** button.



10.	<p>Select the OK button.</p> 																				
11.	<p>Note the Process Instance number, then select the Process Monitor link.</p> 																				
12.	<p>Recall the Process Instance number from the previous step in order to identify the correct row.</p>  <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th>Select</th> <th>Instance</th> <th>Seq.</th> <th>Process Type</th> <th>Process Name</th> <th>User</th> <th>Run Date/Time</th> <th>Run Status</th> <th>Distribution Status</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>297308</td> <td></td> <td>Application Engine</td> <td>EP_MGRDOC</td> <td>T0140635</td> <td>03/20/2022 8:42:45PM EDT</td> <td>Success</td> <td>N/A</td> <td>Details</td> </tr> </tbody> </table>	Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	<input type="checkbox"/>	297308		Application Engine	EP_MGRDOC	T0140635	03/20/2022 8:42:45PM EDT	Success	N/A	Details
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13.	<ul style="list-style-type: none"> • Select the Refresh button. • Repeat the previous step occasionally until Distribution Status displays “Posted”. 																				

14.	<p>After generating a performance evaluation manually, the DPR may validate their results as follows:</p> <ul style="list-style-type: none">• To view the results of running the process to generate performance documents manually, navigate to NavBar > Navigator > Human Resources (HCM) > Workforce Development > Performance Management > View Document Creation Results.• To view all performance evaluation documents, navigate to NavBar > Navigator > Human Resources (HCM) > Workforce Development > Performance Management > Performance Documents > View Documents.
15.	<p>Note: Perform the following if Position Management is missing a Supervisor and/or the Employee is no longer reporting to the Supervisor they reported to during the evaluation year:</p> <ul style="list-style-type: none">• Select the Manager Selection Method list and select the By Manager ID option.• Select the Manager ID field, then enter the former Supervisor’s 8 digit Empl ID. <div data-bbox="415 919 1461 1272"><p>The screenshot shows the 'Performance Administration' interface for 'Create Documents'. At the top, it displays 'Run Control ID: PRIORYEAREVAL', 'Report Manager', 'Process Monitor', and a 'Run' button. Below this is the 'Run Request Parameters' section with the following fields:<ul style="list-style-type: none">Period Begin Date: 01/01/2021Period End Date: 01/01/2022Document Type: MDC-Annual Review EETemplate ID: Employee Performance EvalManager Selection Method: By Manager ID (highlighted with a red box)Manager ID: 00124506 (highlighted with a red box)The name 'Kilvondra Stocker' is visible at the bottom right of the form.</p></div> <ul style="list-style-type: none">• Return to Step 8.